Guide to Virtual Meetings

– A ten-steps tutorial to making virtual meetings an integrated part of your organization’s meeting culture.
Introduction

This hands-on guide will help your organization with the challenging transformation as business communication goes virtual. The following ten simple steps will make your organization save time and money, while having a positive impact on your employees and the environment.

The project ‘REMM’ (Refria Mön i Myndigheter or Virtual Meetings in Public Agencies), so far involving 20 public agencies in Sweden, was initiated to support agencies in building capacity for more and better virtual meeting cultures in their organizations. The REMM methodology, based on a ten-step implementation approach, was well received and applied by the agencies.

After the first four years of running the REMM project, CO2-emission from travel per employee has decreased by 10% on average in the REMM authorities - this seen in contrast to other public agencies where the equivalent emissions have increased by 9% during the same period.

The Swedish Government now requests that an additional 66 authorities apply the REMM methodology.

This publication is a translation of the tutorial used by Swedish agencies in the REMM project.

Virtual meetings neither can nor should replace all face-to-face meetings, but in many situations, they can offer a viable alternative. Moreover, they innovate the way we collaborate, beyond the limitations of the traditional physical meeting settings.

As technology is becoming more readily available, affordable and reliable, many companies and organizations are going through major transformations concerning their business communication, as they rapidly move towards more virtual meetings and collaboration. The use of audio- and videoconferences, webinars and web meetings via computers, telephones or other devices is taking off due to the growing access to sufficient bandwidth.

Initially, virtual meetings are mainly used for internal communication, but as they become part of the business culture, they are increasingly used for external collaboration as well. The main drivers in this development are the potential gains in terms of reduced travel costs, timesaving, efficiency improvements, and less environmental impact.

However, despite all the potential gains, making virtual meetings an integrated part of business collaboration is often a surprisingly difficult and a slow process. There are a few reasons why this is the case: First of all, we are social beings and like to meet each other face-to-face, and many employees enjoy getting out of the office for a while. The virtual meeting is therefore often considered a less attractive option. Secondly, another aspect holding back the development is the need for employees to spend time learning and practicing how to use the new meeting tools, in order to host successful virtual meetings and other events. However, most organizations do not offer their employees the time needed nor any incentives to do so. Employees are therefore less prone to go for the virtual meeting alternatives, and when they do, often they do not know how to set up and manage a successful virtual meeting.

Nonetheless, several organizations use virtual meetings and collaboration extensively and manage them well. Based on the experiences of best-practice organizations, The Swedish Transport Agency (Trafikverket) has developed this ten-step tutorial, offering organizations a structured approach to successfully integrate virtual meetings into their own business and meeting culture.
What do we mean by Virtual Meetings and Collaboration?

By the term Virtual Meetings (VM), we refer to meetings and other forms of collaboration held at a distance in real time with the aid of digital technology. The meetings are mainly audio- and/or video based, such as audio conferencing, video conferencing, and on-line meetings or webinars, but they are often complemented with other forms of collaboration e.g. chat, white boards, document sharing, etc.

By audio conferencing we mean conference calls with three or more participants, either by connecting the different participants through a bridging function (virtual room), by using a conference phone, or both. Video conferencing, a technology that not too long ago was only found in boardrooms, is now available in a wide range of devices, from mobile phones and tablets, computers with webcams, to the high-end video conferencing studios. There are also a wide variety of online meetings and webinars, but common features include video and audio communication, and the possibility to make presentations, share files, share pictures, and cooperate on a virtual whiteboard, while chatting online.

Although these terms are still useful to describe generic forms of virtual meetings, they are all merging together, as technology is becoming more digitalized and moving towards so-called unified communication. Video conferencing is available via computers and mobile phones; you can call in to a videoconference via normal phone or a computer, and meetings can be broadcasted, recorded and viewed later. The opportunities to meet and collaborate virtually are rapidly developing and expanding, at an increasingly affordable cost.

A Step-by-Step Tutorial

In this tutorial, you will find an introduction to what ‘virtual meetings’ are and the important role they play for the success of your organization. This is followed by a description of a systematic approach on how to successfully integrate virtual meetings in your organizations’ meeting culture, divided into ten simple steps.

The tutorial walks you through the approach step-by-step, presenting each of the ten steps on a single page including summaries, checklists as well as success factors and possible pitfalls.

It is recommended to go through the steps following the order given, but feel free to work with several steps in parallel. After these ten steps are presented, you’ll find a section on the implications of using virtual meetings and the effects on an organization, it’s employees and the environment, as well as how to keep track of these effects.

At the end of this tutorial you will find a number of examples of organizations that use virtual meetings successfully.

You will also be able to find more detailed and complementing information in English on the REMM homepage: www.remm.se/en
Why virtual meetings?
Virtual meetings can help an organization in several areas: reduce costs, be more efficient, lessen stress among employees and reduce the environmental impact.

The main economic benefits of virtual meetings are often efficiency improvements, although direct savings through reduced travel costs can also be substantial. Virtual meetings can facilitate communication internally and externally, e.g. providing the opportunity for unscheduled meetings, help strengthening the competitiveness of a company or further national and international cooperation.

An important advantage of virtual meetings is that they increase the availability of key employees as they spend less time being on the move. For the individual employee, the time saved offers more flexibility and reduces stress, both at work and in their private life.

People with little or no experience with virtual meetings are often concerned that it will result in loss of social contact between meeting participants, and that virtual meetings will completely replace all face-to-face meetings. The reality is, however, that users often experience that they can get a better work-life balance, spending more time with family and friends instead of time-consuming and tiring business trips. Moreover, it is easier to attract people to participate in shorter virtual meetings in comparison to arranging a traditional face-to-face meeting where the participants have to spend time and money travelling.

Business travel also accounts for a large part of an organization’s environmental and climate impact, particularly so in service-producing organizations. Virtual meetings can therefore offer an efficient and cost-effective way to reduce environmental impact.

Short return on your investment (ROI)
The cost of investing in for instance a video conferencing system may seem high, but the return of investment is only a few months when the need for business trips is reduced.

Equipment and services for audio-conferencing and web meetings (such as conference phones, headsets and webcams) usually has an even faster rate investment return, as it is relatively inexpensive.

Selecting the optimal form of meeting
A business meeting is governed by a number of different rules, routines and rituals. In addition to talk, we communicate through facial expressions and other means of body language. Every organization has its own meeting culture, and mastering meetings is a valuable skill which is often associated with confidence and respect among fellow employees.
Attempts to change an existing meeting culture will be met by skepticism, it requires experienced employees such as project leaders and managers, time and effort, to learn how to successfully run a new type of meeting.

One important new skill to acquire is the ability to determine when to prefer a virtual meeting over other forms of meeting.

All organizations are different. Factors to take into consideration are for example access to meeting equipment, support and sufficient internet connection, but also the meeting situation – who and how many will participate, have they met before and are they accustomed to meeting virtually? Another thing to take into the purpose of the meeting and its topics: and topic: is it a debriefing or a difficult negotiation?

A few rules-of-thumb exist which can guide you on when virtual meetings work well:

- Meetings within an organization.
- Meetings no longer than two hours.
- Shorter, reoccurring meetings such as monthly debriefings.
- Presentations, information meeting, follow-ups, shorter discussions, one-way information to larger groups
- When the participants have met before and preferably know each other.
- When the participants or the host of the meeting have some experience with the virtual meeting tools used, and with hosting/attending this type of meeting.
- Ad-hoc meetings when key employees need to attend with short notice.

The next question is what type of virtual meeting (VM) technology to use. Again, this is a question where the answer depends on the organization and its VM-maturity. The chart depicted below shows the averaged result from asking employees in three Swedish state agencies what type of meeting they prefer in different meeting situations.

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<thead>
<tr>
<th>VIRTUAL MEETINGS</th>
<th>WEBB</th>
<th>PHONE</th>
<th>VIDEO</th>
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<tbody>
<tr>
<td>Short, repeated meetings</td>
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<td>Meetings to start projects</td>
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<td>Routine project meetings</td>
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<td>Creative discussions</td>
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<td>Workshops no longer than 1,5 hours</td>
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<td>Follow-up meetings</td>
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<td>Info. meetings, eg. from management</td>
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<td>Distance learning</td>
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<td>Meetings that require long trips</td>
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<td>Meetings with poor meeting skills</td>
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The gradation of this matrix is based on experiences from the Swedish Transport Administration project REMM – virtual meetings in Public Agencies (2011-2015, www.remmsnet). This is a general guide, as many different parameters affect how virtual meetings work in different situations. Draft per May 2016.

10 steps

The following ten pages of this guide describe a step-by-step method to successfully introduce and improve the use of virtual meetings (VM), based on experiences from successful implementation and management of virtual meetings in public and private organizations. The method consists of ten steps, and the point (or step) at which your organization enters into this process depends on its progress and maturity in terms of managing virtual meetings. It is not overly important to go through all the ten steps in the ‘correct’ order, but far more important that your organization apply a systematic approach for your own implementation.

The ten steps included in the REMM method are the following:
1. Analyze the point of departure.
2. Get management commitment and resources.
3. Establish a multidisciplinary workgroup.
4. Identify the organization’s VM needs.
5. Map out the technical infrastructure.
6. Select and acquire appropriate VM equipment.
7. Establish routines and procedures.
8. Appoint designated staff.
9. Inform and sell the idea of VM.
10. Follow up and visualize.
An obvious starting point is to find out what your organization’s needs are to meet and collaborate remotely. However, this step is often forgotten in the eagerness to get started and as a consequence, many investments are made in equipment and services that hardly anyone needs or uses.

It is therefore important to get an overview of what those needs actually are. Start by investigating the total costs of business trips, and what the major collaboration requirements are between different sites, units and projects.

Have a look at the travel policy and see if it promotes the use of virtual alternatives. This initial overview helps your organization decide if, and to what extent, it should invest in capacity for virtual meetings.

**Checklist Step 1**

- Investigate the extent of business travel in your organization.
- Estimate the total costs of business travel: a rule of thumb is to double the direct costs (tickets, hotels), and to also include travel time, allowances, administration, etc.
- Map out the major needs for collaboration internally and externally
- Check what the travel policy says about virtual meetings.
- Based on the above, summarize the potential of virtual meetings in your organization.

**First of all, ask yourself:** Why do we need virtual meetings? How can it be useful to us? Who will use it? What opportunities and new ways of cooperation can it lead to?
Based on the information collected in step 1, the management should be able to make a decision to support the initiative and allocate resources. A top management commitment is essential for a successful and well-integrated implementation of virtual meetings.

In addition to allocating sufficient resources, the management needs to emphasize the strategic importance of the investment. It is also important that management leads by example, by changing existing routines (e.g., using video conferencing at every second board meeting) as well as adapting new ways of communicating (e.g., a monthly news-webcast to all employees).

Success factor: An enthusiastic top management that leads by example and inspires its employees to use virtual meetings’ technology.

Checklist Step 2

- Get top-management commitment.
- Secure sufficient resources in terms of money and skilled staff.
- Motivate management to lead by example.
Establish a multidisciplinary workgroup

Engage people from different departments across the organization in order to help promote virtual meetings (VM). This workgroup may include people from management, Human Resources, IT, technical support, administration and superusers.

The established workgroup will manage the implementation of VM in your organization.

Checklist Step 3

- Management on board
- End-users on board
- IT-/technical support on board
- Travel administration on board
- Any other relevant key employees on board

**Success factors:** When you engage people from all over the organization, you enhance the likelihood of a successful promotion of VM.

**Pitfalls:** In general, it is not a good idea to let the technicians who introduced the VM system promote the application. Chances are that the application will be limited by the focus on technique instead of innovative usage.
It is time for a more thorough and detailed analysis. In this step, you must map out the reasons for and types of travel in your organization; which colleagues should be offered VM as an alternative; and which types of communication are needed. It is equally important to find out what drives the already established meeting culture and how eager your colleagues would be to change their meeting habits. It should be your ambition to reach a VM baseline to which you later can compare your VM progress. In this step, you must consider which goals to set, so you can compare them against your successes at the last step in this guide.

### Checklist Step 4

- [ ] Why and to which destinations do your colleagues travel
- [ ] Review of which groups of employees to most likely offer the VM alternative
- [ ] Description of the different types of communication and/or collaboration that exists/ that you want/ that you should have
- [ ] Review of the existing meeting culture
- [ ] Mapping the level of interest of VM in your organization (its VM maturity)
- [ ] Make a description of facts that support investments in VM and implementation of new meeting habits. This can also be used as a baseline to measure progress against
- [ ] Consider which goals your organization should aim for and measured against in step 10
Map out the technical infrastructure

It is all-important to have an exact inventory of your organization’s current technical VM equipment, types of service subscriptions, security issues and levels of support in house.

It is equally advisable to be concerned with the technical VM level of the organizations you plan to collaborate with.

Checklist Step 5

- Detailed description of technical equipment, network infrastructure and supportive software that is available in house
- Inventory of available subscription services
- Inventory of existing security protocols, firewalls, etc.
- Level of available support
- Description of planned collaboration parties’ technical VM maturity level
Select and acquire appropriate VM equipment

You have a clear picture of your communication needs and your technical infrastructure is all mapped out, thanks to close dialog with end-users and in house specialists. It is now time for acquiring appropriate VM equipment, extend your infrastructure and/or services. Perhaps your needs’ analysis support a web-based meeting service rather than acquiring an expensive, professional conferencing system?

Trial and error has shown that a clear-eyed focus on functions rather than a blind trust in a certain brand or equipment will set your organization free in terms of choices and flexibility. What you settle for probably also has to be compatible with your collaboration partners.

Pitfalls:
- Buying substandard or too cheap equipment will be directly measurable in the lack of usage.
- If an external solution is tendered, where the equipment is located outside your own organization, it may hamper the flexibility and be an obstacle of usage.

> Success factors: Virtual meetings depend on technical equipment, which in turn must work well and can be operated with ease. Therefore, you should not save a pretty penny on equipment, since a well working foundation is worth pounds in terms of happy users. Your VM equipment should be so simple that the end-user needs little or no instructions.

Checklist Step 6

- Acquiring needed equipment, infrastructure or services compatible with those you wish to communicate
7 Establish routines and procedures

In order to implement VM successfully in an organization, clear routines and procedures are imperative. As an example, a travel policy is an important document that can be complemented by a meeting policy, or let alone, a meeting policy that simply has travel included as one of many ways of meeting with counterparts. This meeting policy is then part of the company’s rule set and defines the guidelines concerning how and when VM must be applied, time logged, serviced or booked.

In step 7, you are well under way with a functioning booking system for equipment and VM rooms.

Checklist Step 7

- Add a meeting policy to the existing travel policy, or transform both of them into one all-covering meeting policy
- Formulate a set of rules and guidelines to support the meeting policy
- Prepare a booking system for all VM alternatives

Success factors: Meeting demands are vital! Your booking system must not fall short on availability, equipment or facilities. Small-scale pilot setups are often doomed to fail before they even take off.

Pitfalls: In organizations where booking VM facilities is charged between departments, the rate of VM adaptations are usually lower than in organizations where the service is free.
Appoint designated staff

It does not take many technical snags before you lose a potential VM user’s patience.

All aspects must work flawlessly and a technical support organization must be ready. Regarding larger videoconferencing systems, it is prudent to have the connections up and running prior to the meeting to save time. This is a good way to avoid frustration, enhance trust in the system and inspire confidence in the end-user.

**Checklist Step 8**

- [ ] Appoint person(s) in charge of booking
- [ ] Appoint person(s) in charge of maintenance (up-time)
- [ ] Appoint person(s) in charge of support
- [ ] Appoint person(s) in charge of training
- [ ] Appoint person(s) in charge of monitoring progress

**Success factors:** Let designated staff take care of training and offer suggestions of optimal meeting forms, VM when it fits the bill and face-to-face when this is called for. Plan meetings well in advance and schedule recurrent meetings at set times and dates.

**Pitfalls:** Technical snags without support or help can scare off even the most motivated potential VM user.
Inform and sell the idea of VM

In order to make potential VM users forego deeply rooted routines and adopt new ways, it is imperative that the user knows about the alternatives, that they are readily available and that booking a VM session is as easy as making a phone call or making an appointment in Outlook.

People who often arrange meetings, such as management and project team leads, need clear recommendations on which sort of meeting activities fit which situation.

Management plays an important role in selling the idea of VM throughout the organization - a good example to follow, condones and legalizes the adaptation in a natural way.

Checklist Step 9

☐ Inform the organization about the new routines for meetings and availability of VM alternatives via intranet, events, staff meetings, etc

☐ Arrange hands-on events in a relaxed atmosphere

☐ Engage, inform and train people who hold many meetings

☐ Motivate management to be the example to follow

Success factors: The power of example – let employees experience how it is to partake in a virtual meeting, sharing documents or chatting during a web meeting. Point out the obvious human incentives, such as better work-life balance, reduction of our carbon footprint, etc.

Pitfalls: If you try to sell VM with economic incentives as your main argument, chances are it will backfire and be seen as yet another way for management to cut costs.
Management must make sure that the adaptation is followed up by positive user stories. By doing so, the VM can be adopted and innovated, while creating room for further investments. A part of following up is measuring progress. Here are some examples of points to measure:

- Number of VM sessions per full-time employee, divided into phone-, web- and video meetings.
- The price of VM per full-time employee
- The number of business travels per full-time employee, divided into shorter or longer business trips
- The number of travel days per full-time employee
- Travel expenses per full-time employee
- Reduction in emissions due to not travelling per full-time employee
- How virtual meetings are perceived in the organization since its implementation

**Checklist Step 10**

- [ ] Follow up on the extent of VM; how it has affected physical travel; how VM is perceived in the organization now
- [ ] Calculate gains/losses (economically, environmentally, health wise, quality wise)
- [ ] Sum up return on investment (ROI)
- [ ] Evaluate the need for new investments, more information rallies or more hands on training
- [ ] Inform the organization on the findings. For example, if the gains within the environment are significant, consider sharing the findings externally to strengthen the organization’s ethical and environmental statement
The most obvious effect of virtual meetings is that they offer the possibility to avoid travelling to business meetings. However, far from all virtual meetings replace trips; we can think of three possible outcomes:

- **Substitution:** Avoiding a trip that would have taken place if the virtual meeting alternative wasn’t available.
- **Complementarity:** Virtual meetings take place in addition to the traditional meetings, leaving travel volumes unaffected.
- **Generation:** Virtual meetings lead to more efficient operations with a larger contact network, which in turn generate business trips to meet new contacts.

These three effects often occur simultaneously in an organization. The distribution differs from person to person, depending on things like knowhow, drivers and incentives.

Studies in Swedish organizations, however, show that a majority of the virtual meetings are complementary meetings to traditional face-to-face meetings. What is important, however, is that the responses from employees who reported that on average every third virtual meeting had replaced a business trip. Only a few per cent experienced that virtual meetings had led to more travel. The overall result can be seen when comparing business travel data for public agencies working actively to introduce VM, with agencies that did not. Over a period of three years, the active agencies reduced the average CO2 emissions per employee by 10 %, compared with the other agencies that during the same time frame had increased their emissions by 9 %.

Nevertheless, the effects on business travel depend not only on the use of virtual meetings, but just as important is the ambition of the organization to take measures to reduce the costs (fiscal, time, environment and climate) from business travel.

**Social effects**

Virtual meetings provide geographically dispersed organizations with the opportunity to enhance the collaboration between different sites, as they can communicate more frequently, effortlessly and spontaneously.

The stress frequent business travellers may experience, spending a lot of time away from home, can be reduced when virtual meetings replace some of their trips.

Improved flexibility and work-life balance are two major drivers for employees to adopt VM. In addition, VM can offer people who are physically unable or unwilling to travel the opportunity to participate in meetings.

On the other hand, a number of things should also be taken into consideration to avoid or reduce negative
There is a risk that the time “released” or made available by using VM instead of travelling is used for more meetings and more work, raising the tempo at work and thereby increasing the risk for employees to get stressed.

A common situation is when one or a few persons attend a physical meeting via a speakerphone. The remote meeting participants then miss out on much of the communication and dynamics going on in the larger group, hampering the meeting output and impairing the experience for the remote participants. These negative effects can be reduced with the help of a good meeting facilitator. Another way of tackling this problem is to apply “meeting democracy” and to ask all participants to meet in the same way: Virtually in a virtual meeting room.

A risk with VM is that the participants do not get the opportunity to exchange important informal information before, during and after the meeting. In this way, VM as compared to traditional meetings can be regarded as more streamlined and focused on the topic discussed.

But our willingness to socialize drives us to find new forms and channels of communication. The informal chitchat at the coffee break can now just as well take place on social media. Therefore, it’s likely this will pose less of a problem for younger generations.

Practice makes perfect, and as you become more comfortable hosting and attending a certain type of VM, you can relax and get more out of the meeting, as well as better social contact with other meeting participants.

**Economic effects**

As travel expenses commonly is one of the top three variable costs in service-producing organizations, cutting down on travel expenses is an important driver for organizations to increase their use of VM. The total business travel market is a trillion dollar industry worldwide, with more than 270 billion U.S. dollars spent in 2015 by travellers from the United States alone.

In addition to reduced travel costs, the time saved by VM are worth about half of the travel expenses. When comparing the corporate saving with an increased need to invest into technical equipment, networks and support, it becomes clear that the rapid ROI makes investing in VM very favourable: The ratio between possible savings and investment costs is about 10:1. The money saved are equivalent to about 1.5–2.0% of the revenue of an organization.

Moreover, these new VM tools can help an organization in its efforts to develop new, innovative ways of working. It makes it easier to reach out to new/more customers, work with other partners, and to reorganize operations in time and space. The economic effects of virtual meetings and collaboration therefore reach far beyond just being more efficient in current operations. The monetary effects of this development are much harder to estimate, and only anecdotal figures have been found so far.

**Environmental and Climate effects**

The environmental and climate impacts of business travel are often the most significant environmental aspects of an organization. On a global level, greenhouse gas emissions from the predominately fossil fuel-driven transport sector are a major contributor to global warming. At a regional level, the transport sector causes emissions of nitrogen and sulphur oxides, and at a local level it leads to accidents, particulate emissions and noise.

Meeting and collaborating virtually offers organizations the opportunity to cut down on travel while maintaining and even developing its operations. As an environmental improvement measure, it’s preventative and cost effective. But how about the impact of the technical equipment and infrastructure needed for these virtual meetings?

Life cycle assessment, comparing the environmental and climate impacts of virtual meetings with those of travelling, conclude that the impact of the virtual alternatives is only a fraction of that of the travel alternative. However, this requires that the equipment is frequently used and leads to travel substitution. Hence the purpose of this ten-step guide - it is our firm believe that it will help organizations get on the right track, reaping all the benefits and steering around the pitfalls.

As previously stated, after the first four years of running the REMM project in Swedish public agencies, CO2-emission from travel per employee has decreased by 10% on average in the REMM authorities, in contrast to the other public agencies where the equivalent emissions have increased 9 % during the same period.
This guide was first published in 2010. It is a result of the project Resfri (Travel Free), which was run by the SNRA for four years and ended in 2009. The English version was published in 2016.

REMM

The Swedish transport administration (Trafikverket) has been commissioned by the Government to lead and coordinate the project REMM (Virtual Meetings in Public Agencies) since 2011. REMM organizes the work of a number of designated public agencies, in their efforts to increase the share of virtual meetings in their business communication, within the agency as well as with other public agencies.

The first 20 public agencies involved in Sweden were Arbetsförmedlingen, Bolagsverket, CSN, Energiinspektionen, Försäkringskassan, Jorda- och byggnadsverket, Kammarrådet, Lantmäteriet, MSB, Naturvårdsverket, Pensionsmyndigheten, Post- och telestyrelsen, Regeringskansliet, Riksarkivet, Rikspolisstyrelsen, Skatteverket, Tullverket, Trafikverket, Transportstyrelsen, Tullverket.


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